

Managing Medical Needs and Appointments:

A Family Caregiver's Cheat Sheet



Your work helping to care for your loved one can be rewarding but challenging, especially when staying organized with their medical history, medications, medical appointments and other things to document. To help you navigate these responsibilities, here's a cheat sheet designed to streamline and simplify the process.

Organize Medical Information

- Create a health journal.** This should be a detailed journal or digital record of your loved one's medical history, including past and present illnesses, surgeries, allergies, and current medications. This information is crucial during doctor visits and in emergencies, so make sure it is portable and easy to refer to.
- Keep a list of medications.** This list should be updated regularly with all medications, including dosages, schedules and any side effects they cause in your loved one. The medication list should also be portable and brought to every medical appointment.

Schedule and Track Appointments

- Use a calendar system.** Whether it's a digital calendar or a physical planner, use one central place to track all medical appointments, including follow-ups and tests.
- Be prepared.** Before each medical visit, write down any questions or concerns you or your loved one has. This ensures you cover all important points during the appointment. It is handy to keep this in the health journal, along with notes made during the visit.

Understand Their Health Care Coverage

- Review insurance policies. Familiarize yourself with your loved one's insurance coverage, including what is and isn't covered, copay details and any pre-authorizations required for treatments or medications. Record this information in the health journal.
- Keep important documents handy.** Store insurance cards, identification information, and emergency contacts in an easily accessible place.

Build a Support Network

- Establish communication with health care providers.** Develop relationships with your loved one's health care team. They'll want to know who your loved one's designated power of attorney is for health care decisions if that is not you. Discuss the best ways to communicate, whether via phone, email or patient portals. Document this in the health journal.
- Seek support groups.** Connect with local or online caregiver support groups, and schedule meetings on the calendar you are using. Arrange for alternative adult care in advance so you can attend events and recharge your batteries.

Take Care of Yourself

- Recognize the signs of caregiver burnout.** Caregiving can be physically and emotionally draining. Be aware of burnout signs like fatigue, stress and irritability, and seek help if needed.
- Schedule regular breaks.** Ensure you have frequent breaks. Enlist the help of other family members, friends or professional caregivers to provide respite.

Be Prepared for Emergencies

- Have an emergency plan.** Create a plan for medical emergencies. This includes knowing the location of the nearest hospital, having a list of emergency contacts, and understanding any specific medical needs your loved one may have. Document this information in the health journal or wherever you keep key contacts.
- Keep a go-bag ready.** Prepare a bag with essentials like extra medication, important documents, a change of clothes and basic toiletries.

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